Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide step-by-step guidance of how to Create a Manual Pick Wave, Schedule a Pick Wave, Print a Pick Slip Report, Confirm Picking, and Confirm Shipping in the North Carolina Financial System (**NCFS**).

This QRG is to be used in conjunction with Web-Based Training (WBT) **INV103-Warehouse Staff** and Instructor Led Training (ILT) **INV105-Inventory Management** and **INV106-Warehouse Transactions** as well as **INV-14, INV-18, INV-34,** and **INV-35** found here: https://www.osc.nc.gov/training/ncfs-help-documents.
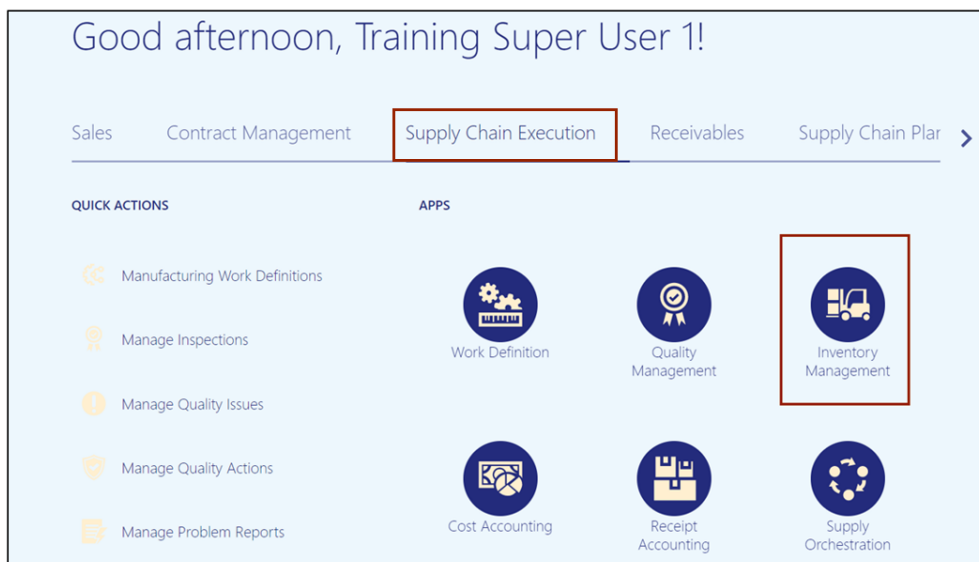
Introduction and Overview

This QRG covers the pick wave process for inventory agencies using NCFS. The pick wave process is used for Self-Service Procurement (SSP) orders for consumption or Transfer Orders for replenishment and warehouse movement. Not all transactions use the pick wave process, such as the NC Direct Issue miscellaneous transaction; see **INV-16** for more information found here: https://www.osc.nc.gov/training/ncfs-help-documents.
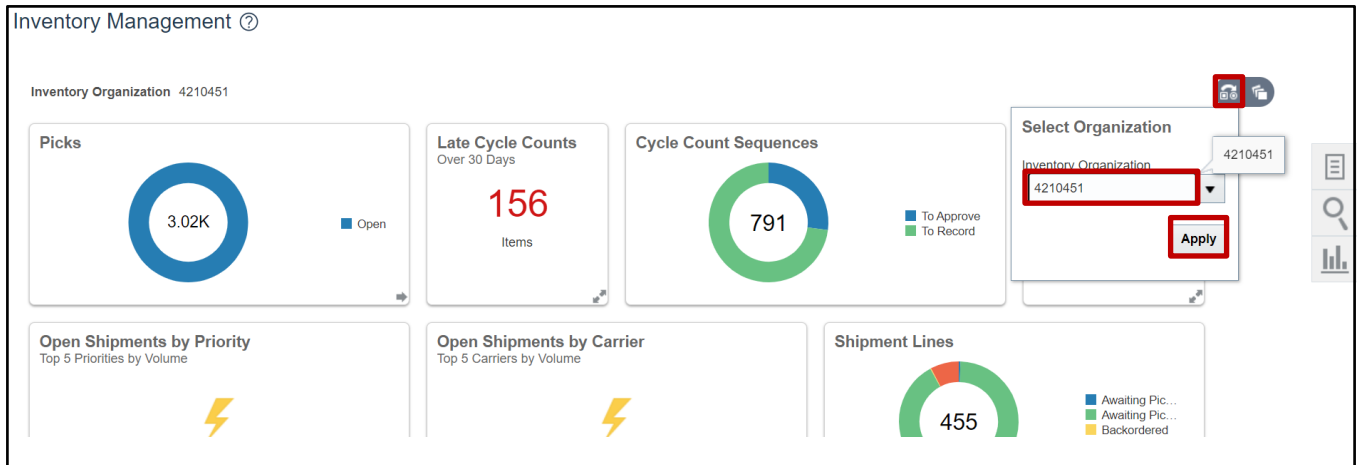
Create a Manual Pick Wave

To schedule a pick wave in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, under the **Supply Chain Execution** tab, click the **Inventory Management** app.
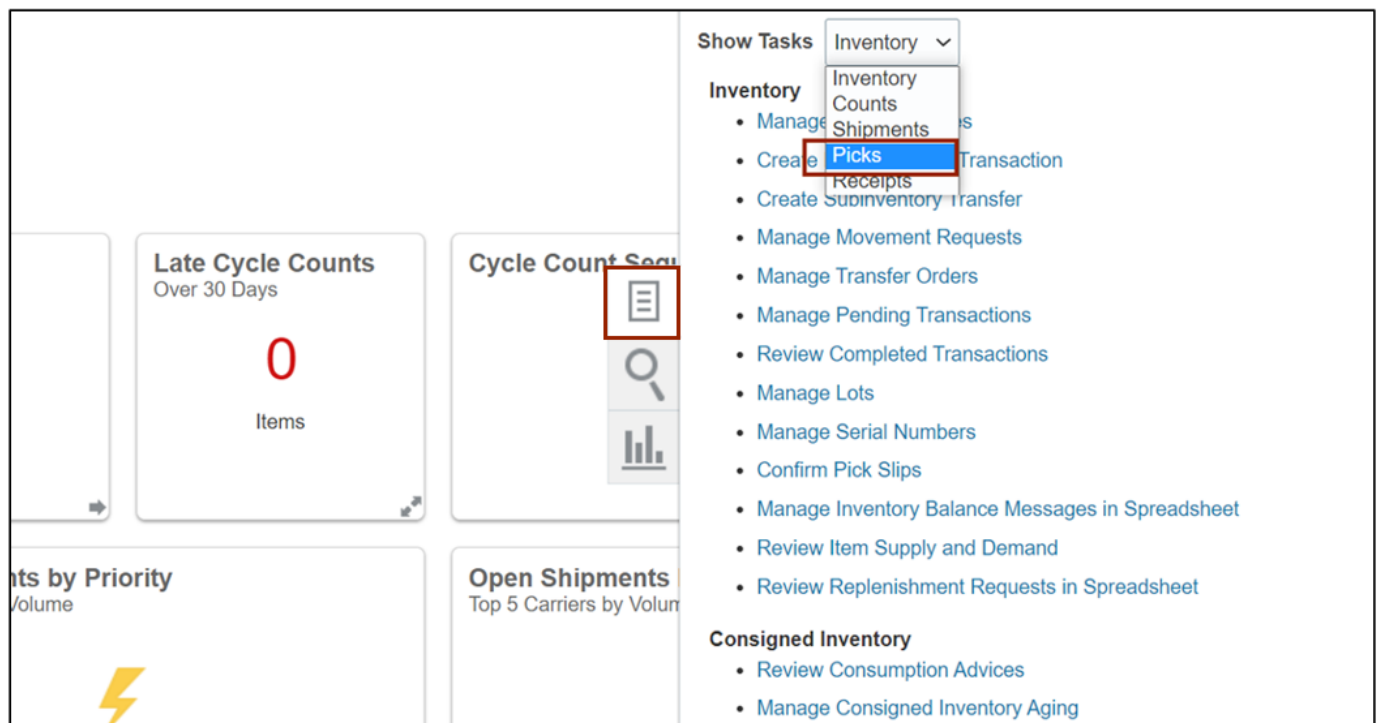
3. On the **Inventory Management** page, click the **View by [ ]** icon and enter the **Organization ID**. Click the **Apply** button.
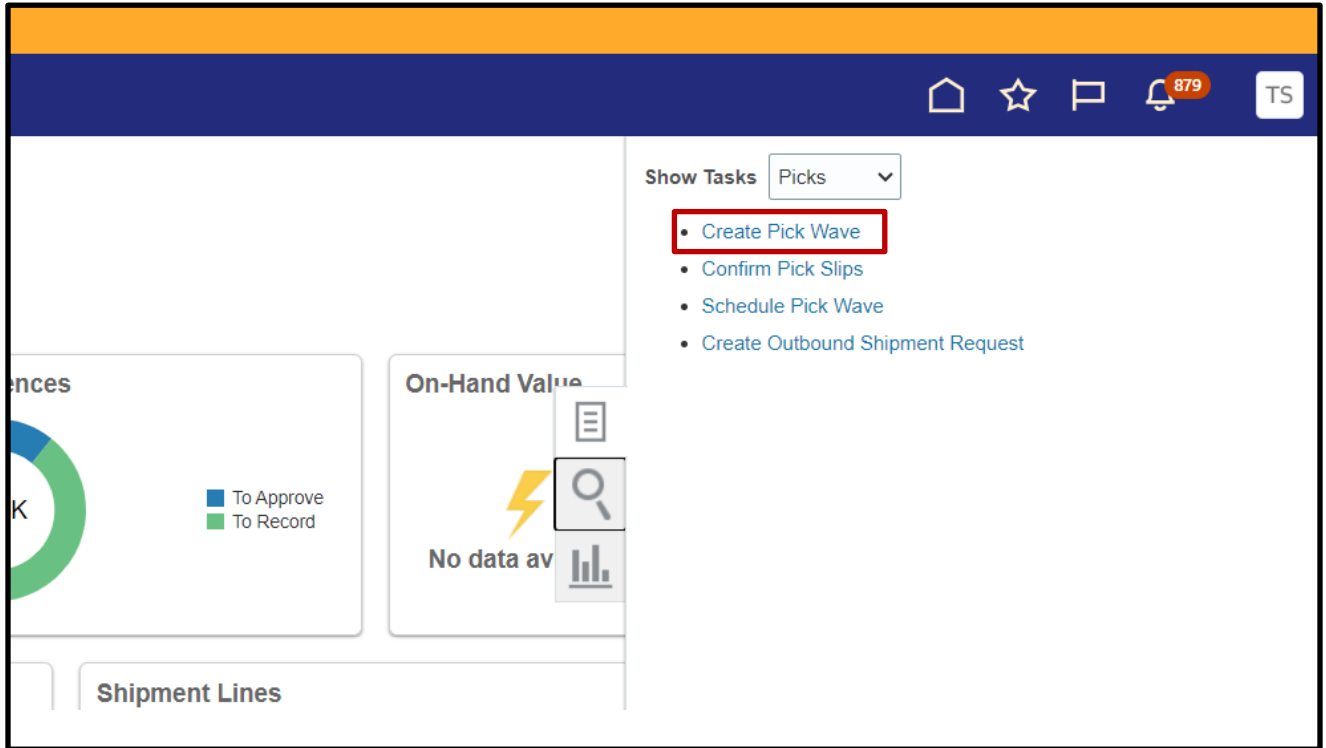

4. Click the **Tasks [ ]** icon and select **Picks** from the *Show Tasks* drop-down choice list.

5. Click **Create Pick Wave.**

6. Choose the **Release Rule** for your Inventory Organization from the Drop-Down List.
7. Open the **Order** Drop-Down List and click **Search….**
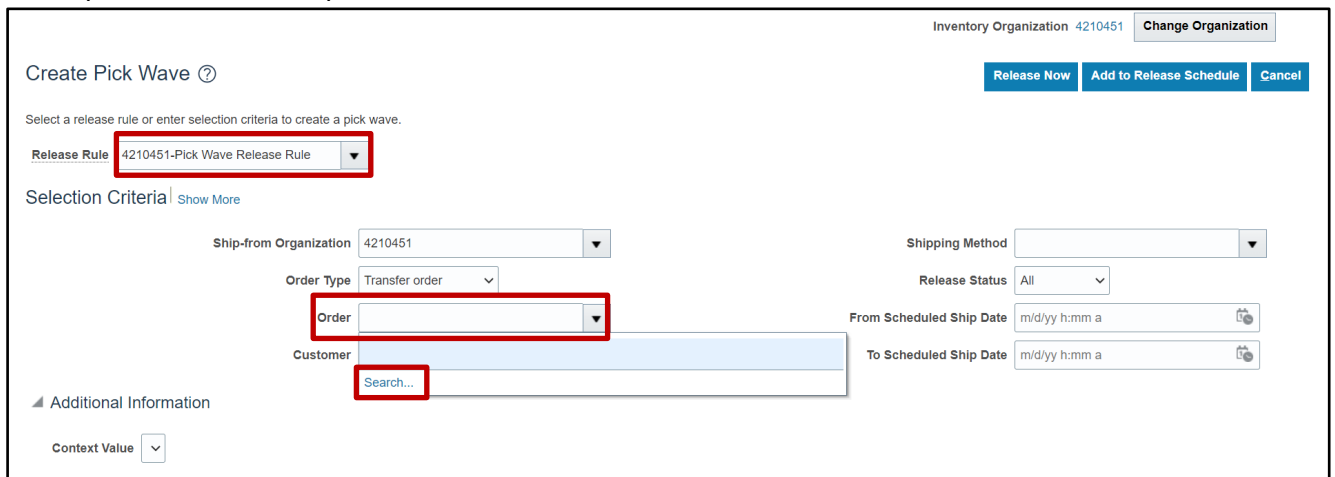
8. Search for the order to be picked. The **Advanced** button will assist with searching partial information.

   In this example, order 122033 was used. Click **Search.** In the search results section, click the order to select it then click **OK.**

9. Click **Release Now**. The Pick Wave has been released for picking.

Schedule a Pick Wave

To schedule a pick wave in NCFS, please follow the steps below:

1. On the **Home** page, under the **Supply Chain Execution** tab, click the **Inventory Management** app.
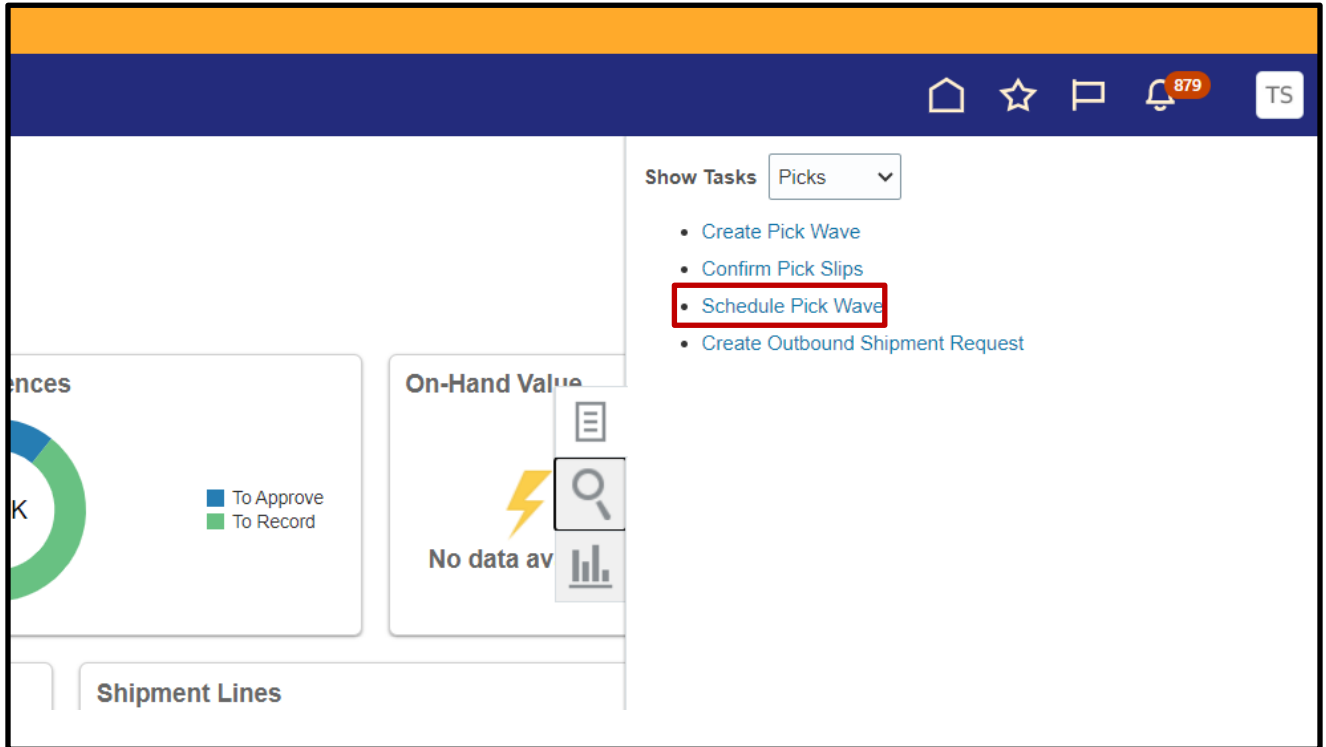
2. On the **Inventory Management** page, click the **View by [ ]** icon and enter the **Organization ID**. Click the **Apply** button.

3. Click the **Tasks [ ]** icon and select **Picks** from the *Show Tasks* drop-down choice list.

4. Click **Schedule Pick Wave.**

5. Choose the **Release Rule** for your Inventory Organization from the Drop-Down List.

6. Switch to the Advanced view by clicking **Advanced.**

7. Click the **Schedule** tab.

8. Click the **Using a schedule** radio button and choose the frequency from the Frequency drop-down list.

   In this example, Daily was chosen.

9. Enter your Start and End Dates.

   In this example, an end date of 2099 was chosen.

Note: Change other options as necessary before moving onto the next step.

10. Click **Submit** to schedule your Pick Wave.

Generate Pick Slip Report

To generate a pick slip report in NCFS, please follow the steps below:

1. On the **Home** page, under the **Tools** tab, click the **Scheduled Processes** app.

2. On the **Scheduled Processes** page, click **Scheduled New Process.**

3. Type "*Print Pick Slip Report*" in the **Name** field. Click **OK.**

4. Choose *Released to warehouse* from the **Line Status to Print** drop-down list. Choose *Both* from the **Item Display** drop-down list. Choose the Inventory Organization from the **Ship-from Organization** drop-down list.

5. Click **Submit.**

6. Click the **Refresh** button [↺] until the Print Pick Slip Report status shows as Succeeded.

7. Click the **Print Pick Slip Report** line Under the **Process Details** tab, click the **Republish** icon [ ].

8. The **Print Slip Report** pop-up will appear. Click the **Actions** button [⚙]. Mouse over the **Export** list and click **PDF.**

9. Open and view the output.
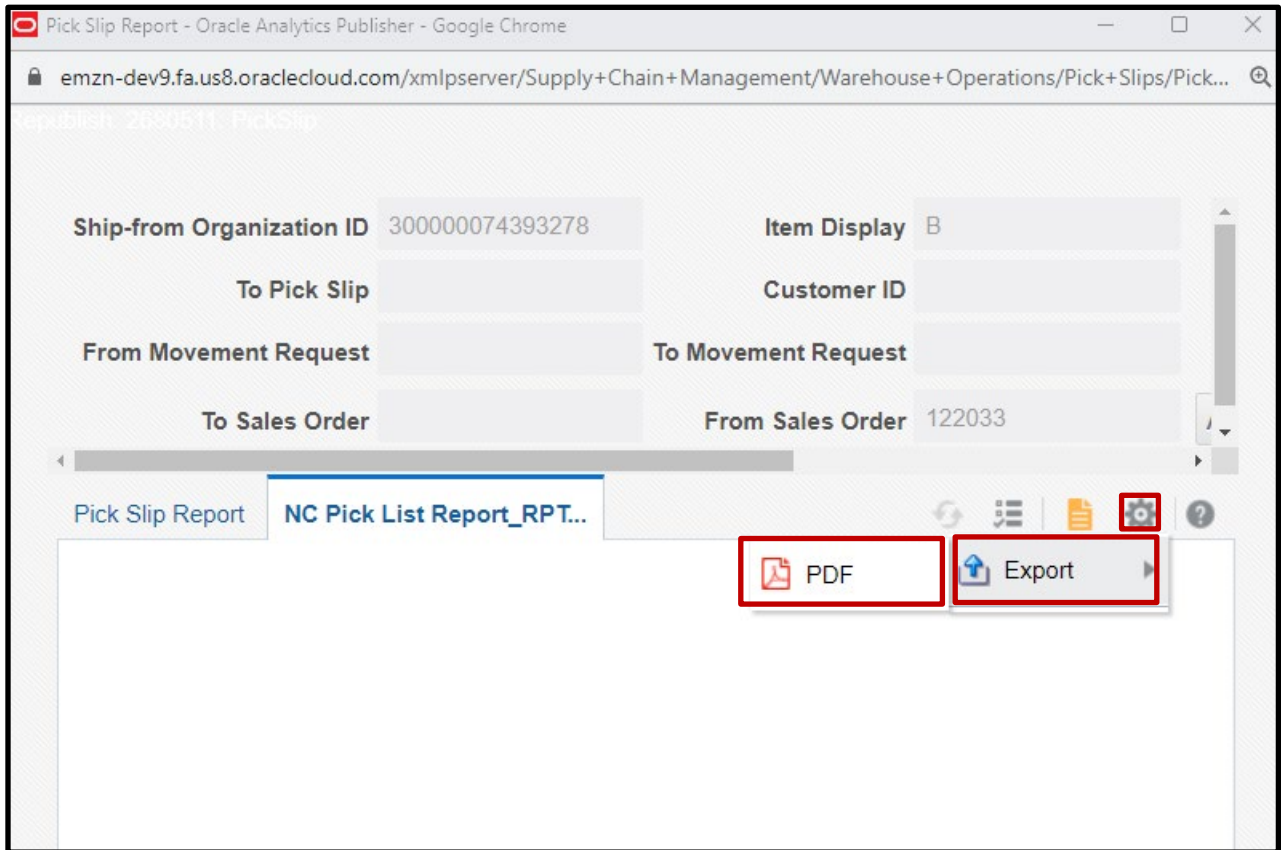
8. Click the **Actions** icon and select **Export.** Select the format (PDF) to get the report output.

9. Open and view the Output.

Process Details   ✕

ⓘ This process will be queued up for submission at position 1

[Process Options] [Basic] [Submit] [Cancel]

Name Print Pick Slip Report   ☐ Print output Check P ∨

Description Provides information for picks and the correspo...   ☐ Notify me when this process ends

Schedule Using a schedule   Submission Notes [   ]

Advanced Options

Parameters **Schedule** Output Notification

Run ◯ As soon as possible

     ◉ Using a schedule

Schedule Pick Slip Report

To schedule a pick slip report in NCFS, please follow the steps below:

1. On the **Home** page, under the **Tools** tab, click the **Scheduled Processes** app.

2. On the **Scheduled Processes** page, click **Scheduled New Process.**

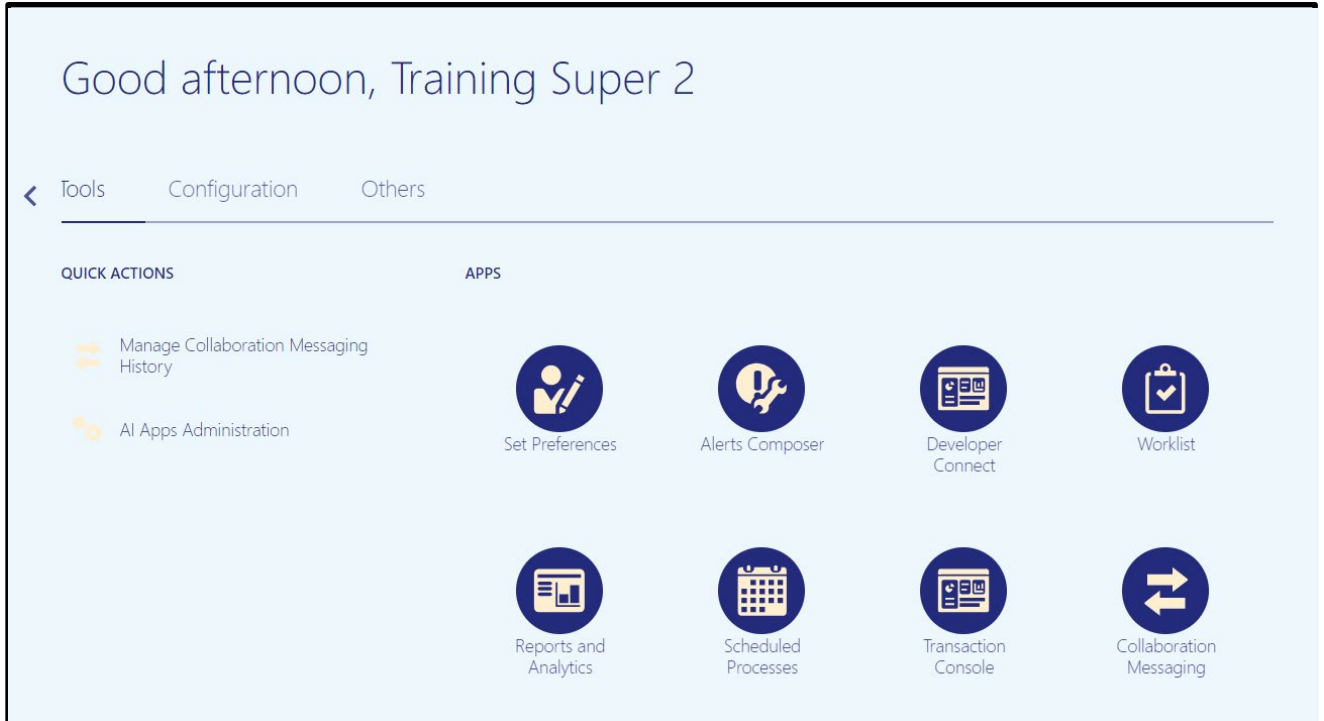3. Type "*Print Pick Slip Report*" in the **Name** field. Click **OK.**

4. Choose *All* from the **Line Status to Print** drop-down list. Choose *Both* from the **Item Display** drop-down list. Choose the Inventory Organization from the **Ship-from Organization** drop-down list.

Process Details   ✕

ⓘ This process will be queued up for submission at position 1

[Process Options] [Advanced] [Sub**m**it] [**C**ancel]

Name Print Pick Slip Report   ☐ Print output [▾]

Description Provides information for picks and the correspo...   ☐ Notify me when this process ends

Schedule As soon as possible   Submission Notes [   ]

Basic Options

Parameters

Ship-from Organization	428330R ▾
From Pick Slip	▾
To Pick Slip	▾
Shipping Method	▾
From Order	▾
To Order	▾
From Movement Request	▾
To Movement Request	▾
Customer	▾
* Line Status to Print	All ⌄
* Item Display	Both ⌄

5. Switch to the Advanced view by clicking **Advanced.**

6. Click the **Schedule** tab.

7. Click the **Using a schedule** radio button. Choose the frequency from the **Frequency** drop-down list.

    In this example, Daily was chosen.

8. Enter your Start and End Dates.

   In this example, an end date of 2099 was chosen.

9. Click the **Output** tab to determine output location. Click **Add Output Document.**

10. Use **Name** field to name your output. Click **Add Destination** to choose a destination and complete relevant fields.

11. Click **Submit** to schedule your pick slip report.

Confirm Pick Slips

To Approve Customer Orders in NCFS, please follow the steps below:

1. On the **Home** page, under the **Supply Chain Execution** tab, click the **Inventory Management** app.
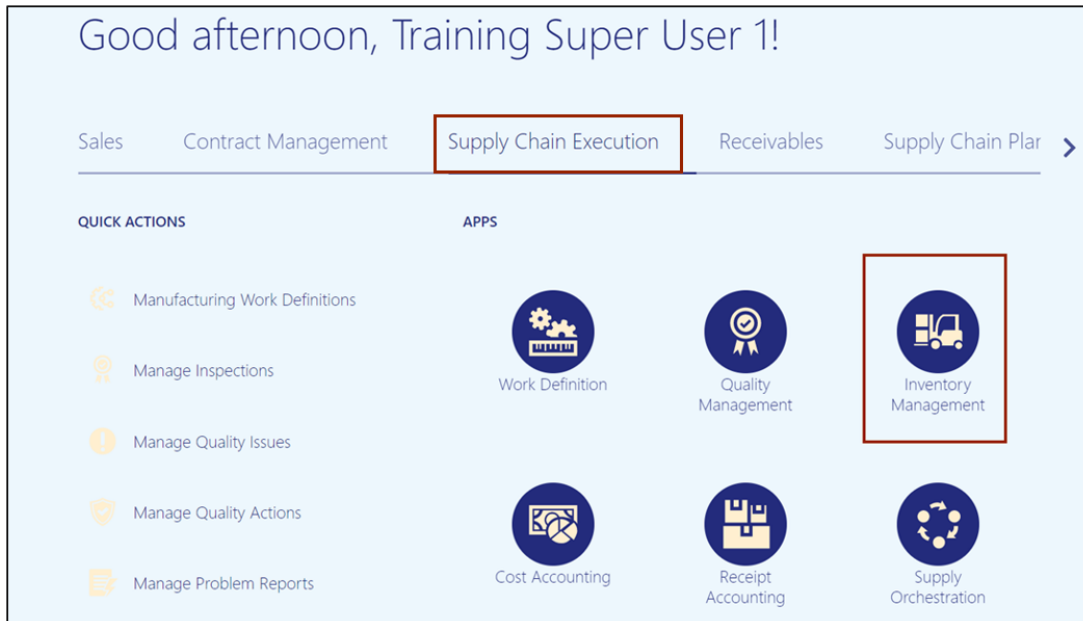
2. On the **Inventory Management** page, click the **View by [ ]** icon and enter the **Organization ID**. Click the **Apply** button.

3. Click the **Tasks [☰]** icon and select **Picks** from the *Show Tasks* drop-down choice list.
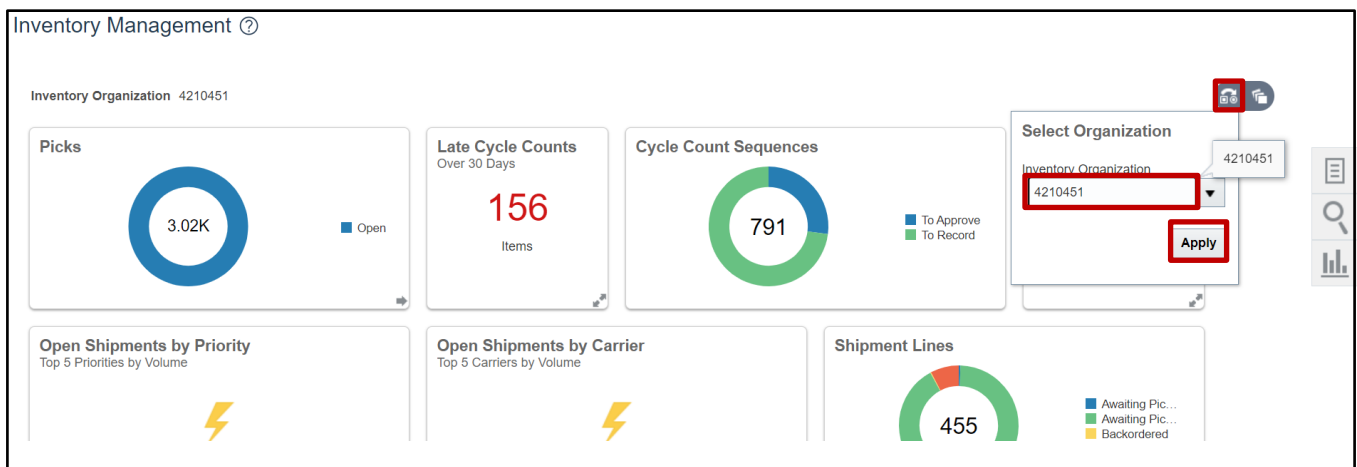
4. Click **Confirm Pick Slip.**

5. Use the search fields to find the pick wave. In this example, the Order number 122033 was searched by using the **Order** field. Click **Search** to view the results.

6. Click the **Pick Slip Number** link to go to the **Confirm Pick Slip** page.

7. Make any changes to the pick lines. Click the **Ready to Confirm** check box. Click **Confirm**. You can click **Confirm and Go to Ship Confirm** by using the Drop-Down List to go directly to Ship Confirm.

Ship Confirm a Pick

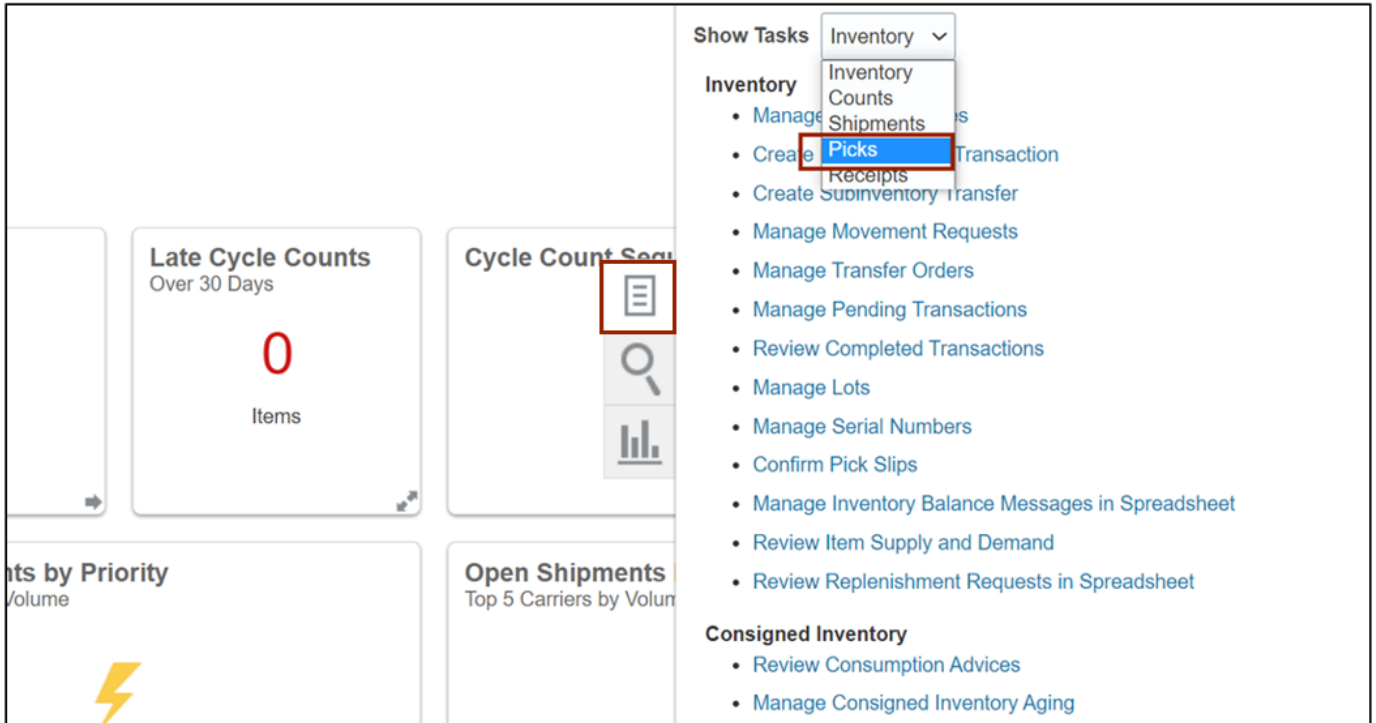To Ship Confirm a Pick in NCFS, please follow the steps below:

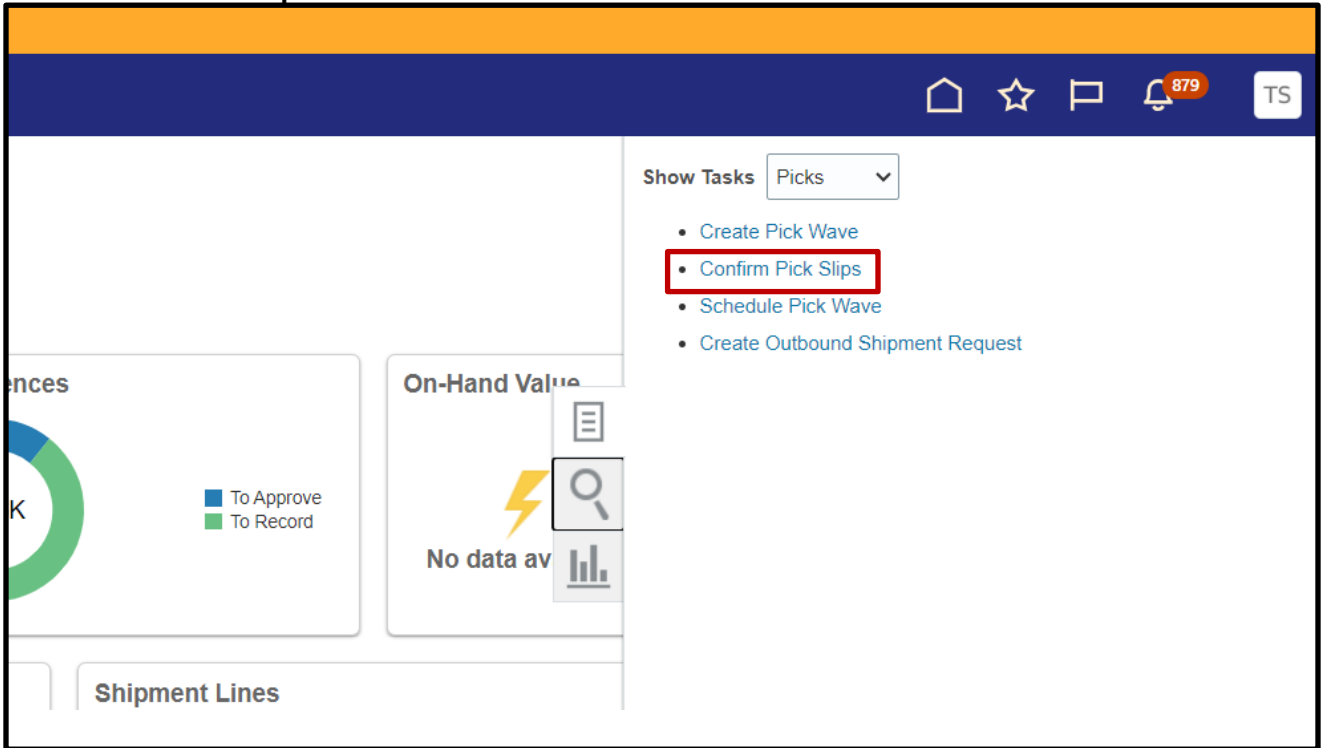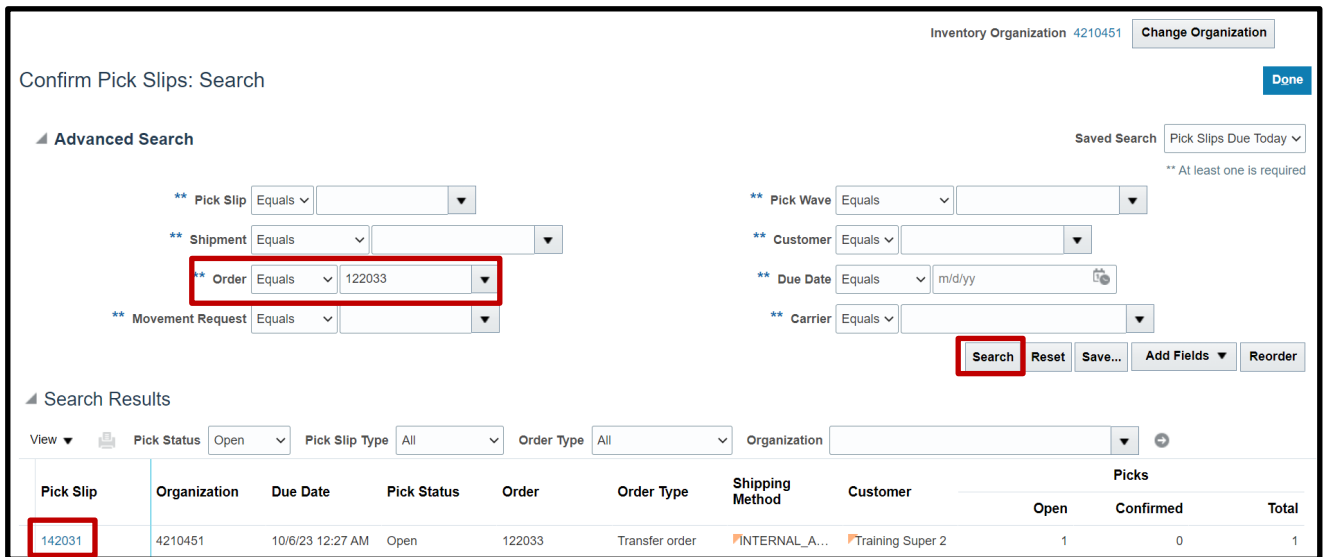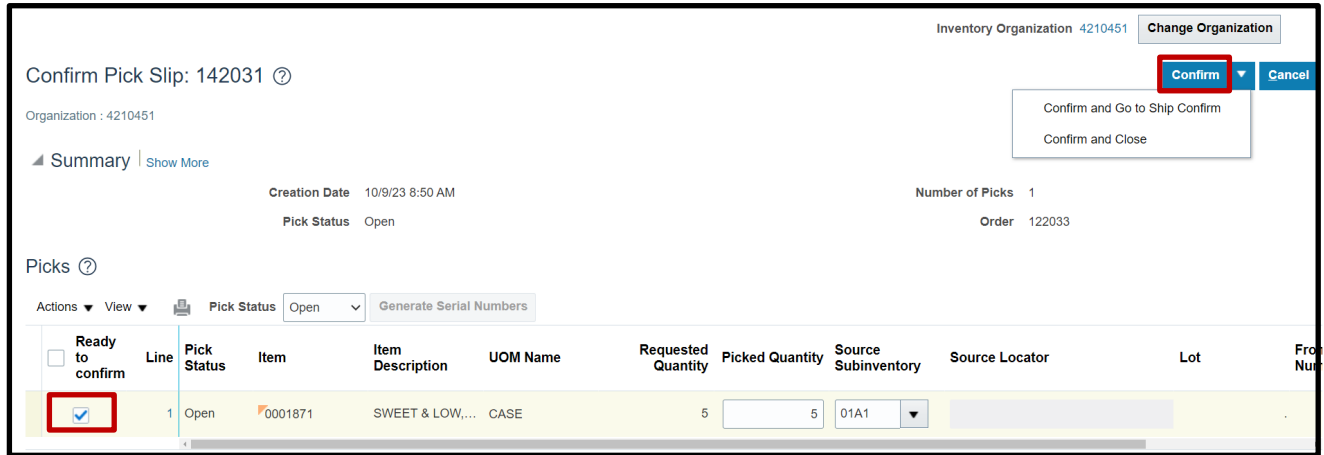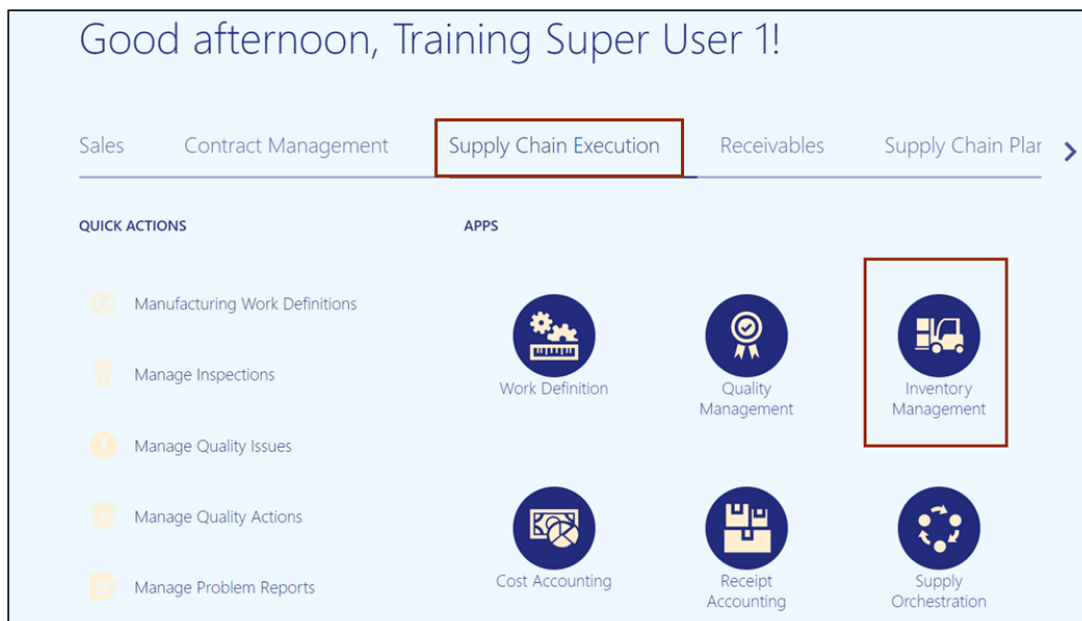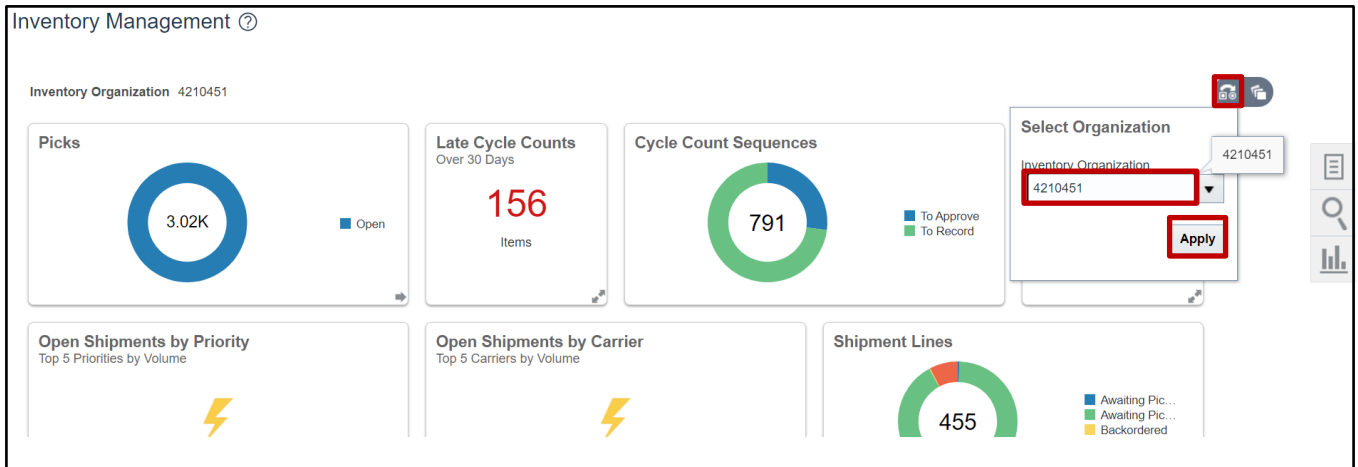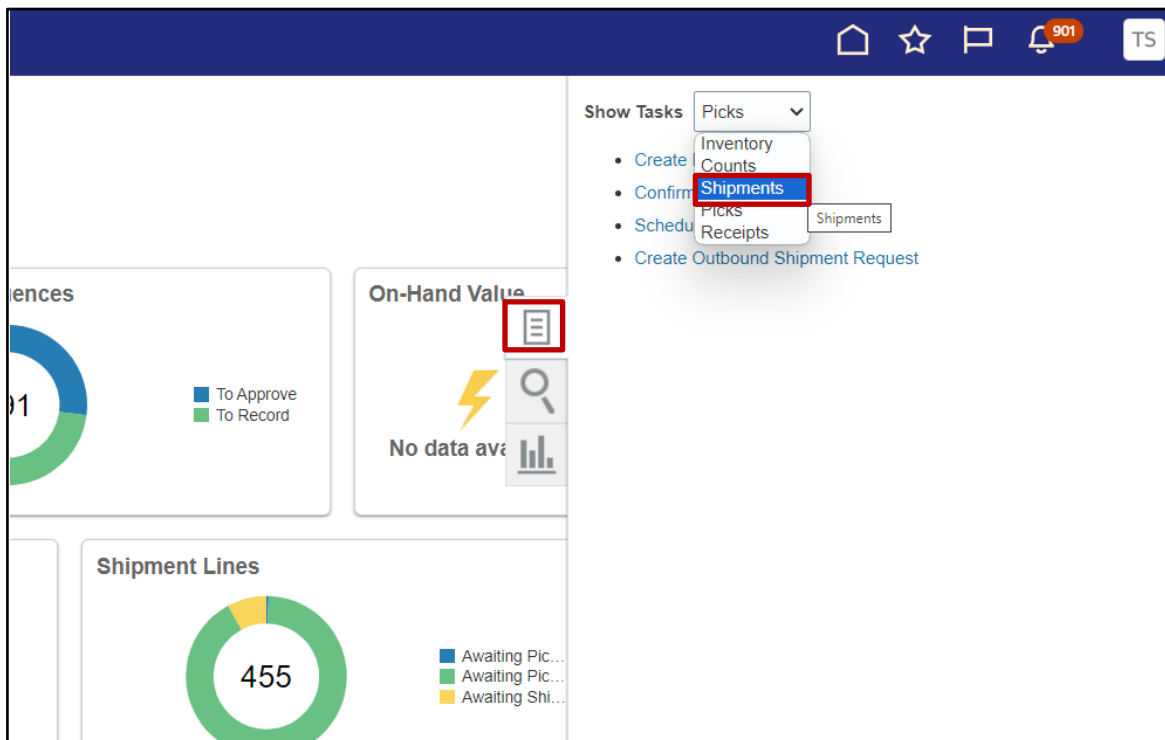1. On the **Home** page, under the **Supply Chain Execution** tab, click the **Inventory Management** app.
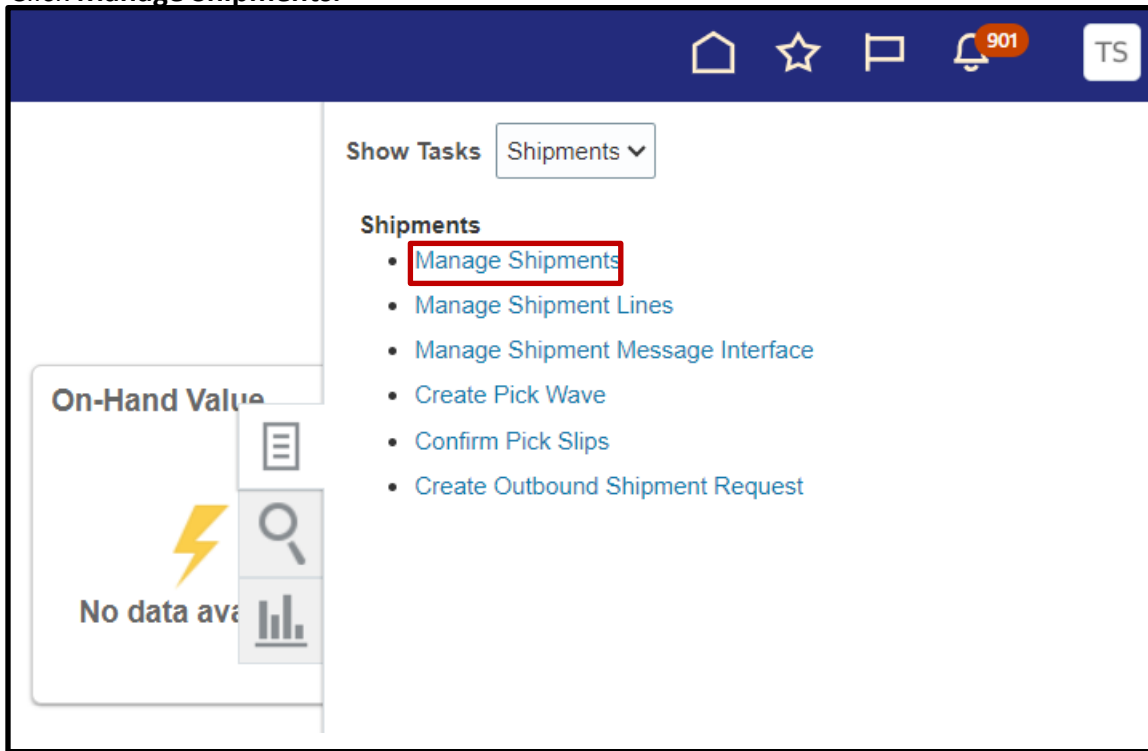
2. On the **Inventory Management** page, click the **View by [ ]** icon and enter the **Organization ID**. Click the **Apply** button.

3. Click the **Tasks [ ]** icon and select **Shipments** from the *Show Tasks* drop-down choice list.
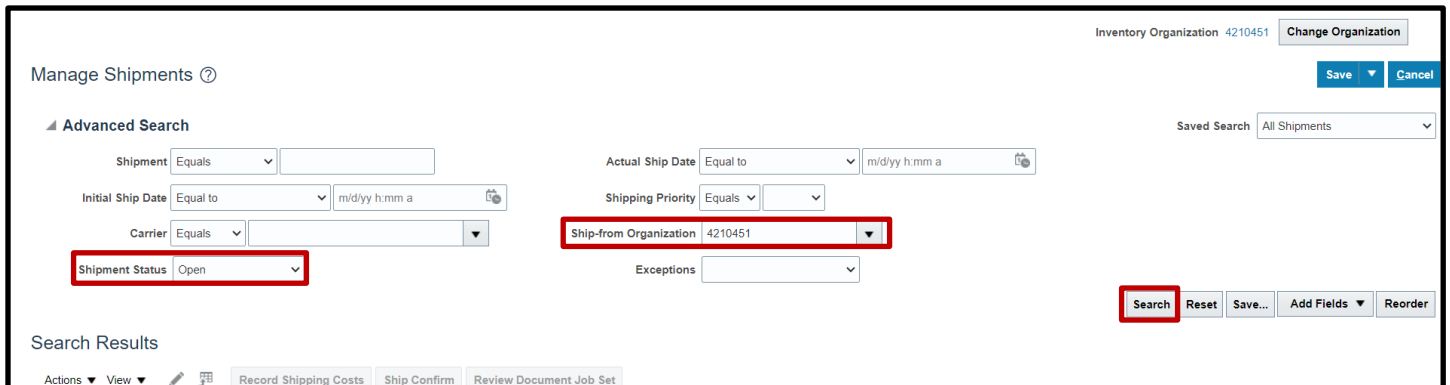
4. Click **Manage Shipments.**

5. Use the search fields to search for the order to be Ship Confirmed.

   In this example, open orders for Inventory Organization 4210451 were searched. Click **Search.**

6. Click the **Shipment** number.

7. On the **Edit Shipment** page, make any necessary changes then click **Ship Confirm.**

Wrap-Up

This QRG covers the pick wave process for inventory agencies using NCFS. The pick wave process is used for Self-Service Procurement (SSP) orders for consumption or Transfer Orders for replenishment and warehouse movement. Not all transactions use the pick wave process, such as the NC Direct Issue miscellaneous transaction; see **INV-16** for more information found here: https://www.osc.nc.gov/training/ncfs-help-documents.

Additional Resources

- INV 103: Warehouse Staff (WBT)
- INV 105: Inventory Management (ILT)
- INV 106: Warehouse Transactions (ILT)
- INV-14, INV-18, INV-34, and INV-35: https://www.osc.nc.gov/training/ncfs-help-documents (QRG)